# Employee Post-Travel Disclosure of Travel Expenses

SECRETARY OF THE SENATE PUBLIC RECURDS

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

· 2018 AUG 22 PM 4: 02

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	ule 35.2(a) and (c), I mer me. I also certify that	_	osures with respect to	travel expenses that have been or wi
		rization (Form RE-1), stification Form with al		y, invitee list, etc.)
Private Sponsor(s) (lis	t all): Hoover Institution	n, Stanford University	<u> </u>	
Travel date(s): Augus	st 14-16, 2018			
Name of accompanyin Relationship to Travel	<u> </u>	* -		
	COSTS IN EMPLOYEE	EASE DUE TO THE ACCENTAGE EXPENSES. (Attach additional)		SE OR DEPENDENT CHILD, ONLY
Expenses for Employ	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate  Actual Amount	\$565.90 Roundtrip Airfare	\$320 (\$160/night)	\$128.01	\$82.70 Ground Transportation
Expenses for Accomp	panying Spouse or De	pendent Child (if applied	cable):	
<u> </u>	Transportation Expenses	Lodging Expenses	Meal Expenses ext	Other Expenses (Amount & Description)
	<u> </u>	<u> </u>		
☐ Good Faith Estimate ☐ Actual Amount	n/a	n/a	n/a	n/a
Estimate  Actual Amount	n/a			n/a Attach additional pages if
Estimate  Actual Amount  Provide a description	n/a of all meetings and ev			
Estimate  Actual Amount  Provide a description necessary.):	of all meetings and ev		te Rule 35.2(c)(6). (A	
Estimate  Actual Amount  Provide a description necessary.):  See attached agend  (Date)	of all meetings and everage an	ents attended. See Sena  M. M- Gwire	te Rule 35.2(c)(6). (A	Attach additional pages if  Cam, M-Lune
Estimate  Actual Amount  Provide a description necessary.):  See attached agend  (Date)  TO BE COMPLETED	of all meetings and everage an	ents attended. See Sena  M. M- Gwie  ame of traveler)  MEMBER/OFFICER: es set out above in conne	te Rule 35.2(c)(6). (A	Attach additional pages if  Cam Manue  (Signature of traveler)  Acribed in the Employee Pre-Travel

(Revised 1/3/11)

(Date)

**(:)** 

Form RE-2

(Signature of Supervising Senator/Officer)

Pre-Travel Filing Instructions: Complete a prior to the travel departure date to the Selection Incomplete and late travel submissions will form must be typed and is available as a fill at ethics. senate.gov. Retain a copy of your enequired post-travel disclosure.	ct Committee on Ethics in SH-220.  not be considered or approved. This able PDF on the Committee's website	ETHIC JUL 3'18pm12:56
Name of Traveler:	Monica M. McGuire	
Employing Office/Committee:	Office of Senator John	nny Isakson
Private Sponsor(s) (list all): Stanford Uni	versity's Hoover Institution	
Travel date(s): August 14-16, 2018  Note: If you plan to extend the trip for	or any reason you <u>must</u> notify the Com	mittee.
Destination(s): Stanford University, Palo	Alto, CA	·
Explain how this trip is specifically connected	d to the traveler's official or representa	ational duties:
This education seminar will be focused on "Econ more on the economy. As tax policy advisor to a boosting economic prosperity was a significant fahelp the U.S economy to grow and be more com will specifically address my issue responsibilities.	member of the Finance Committee and research actor used in selecting provisions to be included and the semiportion of the global marketplace. The semiportion is a semiportion of the se	sponsible for economic and financial issue ided in the 2017 tax reform law that would
Name of accompanying family member (if an Relationship to Employee:   Spouse		-
I certify that the information contained in this	s form is true, complete and correct to	the best of my knowledge:
JW432018	manu	n m- Lune
(Date)		Signature of Employee)
TO BE COMPLETED BY SUPERVISING SENA Secretary for the Majority, Secretary for the Mino	•	Secretary of the Senate, Sergeant at Arn
Office of Senator Johnny Isakso	n hereby authorize	onica M. McGuire
(Print Senator's/Officer's Name)	<del></del>	Print Traveler's Name)
an employee under my direct supervision, to related expenses for travel to the event descributies as a Senate employee or an officeholde private gain.	bed above. I have determined that this	s travel is in connection with his or he
I have also determined that the attendance of of the Senate. (signify "yes" by checking box)		opriate to assist in the representation
1-3-18		
(Date)	(Signature of S	upervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

(Revised 10/19/15)

Date/Time Stamp:

Form RE-1



Dear Ms. McGuire,

We are pleased to inform you that you have been selected to attend the Hoover Institution's Stuart Family Congressional Fellowship Program, which takes place on the Stanford University campus in Palo Alto from August 14-16, 2018. To proceed, please confirm your agreement to attend by completing this form by the close of business on Friday, July 6th.

IMPORTANT: Given that the Senate is scheduled to be in session during our fellowship, we are requiring that you confirm your ability to attend even if the Senate remains in session during our travel dates.

Once confirmed, you will need to complete the necessary ethics paperwork. In this packet, you will find the necessary forms to be submitted to your ethics committee. This packet includes:

- Employee Pre-travel Authorization Form (For you to fill out)
- Private Sponsor Travel Certification Form
- Agenda & Flight itinerary
- This letter as a Copy of Sponsor Invitation
- List of Senate participants

You will need to fill out the Employee Pre-travel Authorization Form and submit this entire packet to your Ethics Committee for review by Friday, July 13th. Upon submission, please notify Andrew Clark at afclark@stanford.edu

The Congressional Fellowship will take place from August 14th through August 16th. Plan to depart from Washington, D.C. the morning of August 14th and return the afternoon of August 16th. Please be sure to review all of the action items and deadlines in the attached document titled "Next Steps."

Should you have any questions, do not hesitate to let us know. Again, thank you for your participation. We look forward to welcoming you to Stanford University and expect an excellent program.

Sincerely,

Michael G. Franc

Director, Washington D.C. Programs Hoover Institution, Stanford University

From: Andrew F Clark <afclark@stanford.edu>

Sent: Monday, June 25, 2018 6:00 PM

To: McGuire, Monica (Isakson) < Monica\_McGuire@isakson.senate.gov>

Subject: Stuart Family Congressional Fellowship

Dear Ms. McGuire,

On behalf of the Hoover Institution in Washington, it is my pleasure to welcome you to the August 2018 Stuart Family Congressional Fellowship. Please review the attached welcome letter from Mike Franc, Director of Washington, D.C. Programs.

Also attached are several important documents: The first is a "Next Steps" document detailing required action items and deadlines. The first of which is to review the attached materials carefully, and <u>register to attend via this link</u> as soon as possible. The deadline to register is close of business on Friday, July 6th.

**IMPORTANT**: Given that the Senate is scheduled to be in session during our fellowship, we are requiring that you confirm your ability to attend irregardless of the possible cancellation of August recess on our travel dates.

The other documents are to be included in the packet submitted to your ethics committee. The deadline to submit these ethics materials is Friday, July 13th. Please notify me (afclark@stanford.edu) upon filing.

Should you have any questions, please don't hesitate to let me know. Thank you for your participation, we are looking forward to an excellent program.

Sincere regards,

Andrew Clark

Hoover Institution, Stanford University

Administrative Assistant for External Affairs

Email: afclark@stanford.edu Direct: (202)-760-3189

### McGuire, Monica (Isakson)

From: Hoover Institution < hooverdc@stanford.edu>

Sent: Thursday, June 7, 2018 12:01 PM
To: McGuire, Monica (Isakson)

Subject: Last weekend to submit interest in Stuart Family Congressional Fellowship - STAFFDEL

to Stanford University



# Stuart Family Congressional Fellowship Program: "Examining America's Economic Prosperity"

## August 14-16, 2018

Twice a year the Hoover Institution in Washington convenes a group of Congressional staff at Hoover's facilities on Stanford University's campus in Palo Alto, California for an educational seminar that features the Hoover Institution's Senior and Research fellows, along with other distinguished visiting scholars.

The theme of this August's fellowship will center on "Economic Prosperity" and will feature some of Hoover's prominent experts on issues such as regulation, taxation, innovation, education, health care, labor, and entitlements. Confirmed speakers to date include Ed Lazear, John Cogan, Henry Miller and David Henderson.

The <u>submission process</u> for the fellowship is now live, you can learn more about the Hoover Institution, the fellowship and how to submit interest on our website.

The deadline to submit interest is 11:59pm on Wednesday, June 13th.



For additional information on the fellowship or the Hoover Institution in Washington, please contact:

Russell Wald, Senior Manager of External Affairs, <a href="mailto:rwald@stanford.edu">rwald@stanford.edu</a>
Trevor Carlsen, Manager of External Affairs, <a href="mailto:tcarlsen@stanford.edu">tcarlsen@stanford.edu</a>

Hoover Institution | 1399 New York Avenue, NW, Suite 500, Washington, DC 20005

<u>Unsubscribe monica mcguire@isakson.senate.gov</u>

<u>Update Profile</u> | <u>About our service provider</u>

Sent by hooverdc@stanford.edu in collaboration with



# PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1.	Sponsor(s) of the trip (please list all sponsors): Stanford University's Hoover Institution
2.	Description of the trip: An intensive program for congressional staff which consists of three days of seminars, simulations,
	and keynote presentations.
3.	Dates of travel: 08/14/2018 - 08/16/2018
4.	Place of travel: Stanford University, Palo Alto, CA
5.	Name and title of Senate invitees: See attached list
6.	I certify that the trip fits one of the following categories:
	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.  - OR -
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7.	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	- AND -
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8.	I certify that:
	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.  - AND -
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B)  I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a
	foreign principal, one of the following scenarios applies:  (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one
	overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.  — OR —
	<ul> <li>□ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).</li> <li>- OR -</li> </ul>
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	Stanford University's Hoover Institution solely planned all aspects of the trip, including topics to be discussed, travel/accommodation
	logistics, and required paperwork. Hoover employees will also be responsible for traveling with congressional staff and managing
	logistics for the duration of the trip.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	The Hoover Institution is a research institution that seeks to improve the human condition by advancing ideas that promote
	economic opportunity and prosperity while securing and safeguarding the peace through its world renowned scholars, library and
	archives, as well as by engaging Congress and its staff.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	This is the fifth sponsored trip for congressional staff organized by the Hoover Institution. The latest of which was in April of 2018
	and had a similar format as this trip.

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	rer Institution regularly sponsor	s policy panels and round	dtables for think tank schola	ars, journalists,
congressional staff, execu	tive branch officials, academics	and members of the ger	neral public.	
Total Expenses for E	ach Participant:			
	Transportation	Lodging	Meal	Other
	Expenses	Expenses	Expenses	Expense
Good Faith	\$600 airfare			
estimate	\$400 ground	\$320 total (\$160/night)	\$160 total (\$64 per diem)	n/a
☐ Actual	transportation			
Amounts				
participation or b) the congressional participation	rip involves an event that trip involves an event the trip involves an event the pation:	hat is arranged or or	<del>-</del>	_
participation or b) the congressional participation	e trip involves an event the cation:	hat is arranged or or	<del>-</del>	_
participation or b) the congressional participation.  This trip is arranged/organ	e trip involves an event the cation:	nal participation.	<del>-</del>	_
participation or b) the congressional participation.  This trip is arranged/organ.  Reason for selecting to the congressional participation.	e trip involves an event the pation:	nal participation.	ganized specifically w	vith regard to
participation or b) the congressional participation.  This trip is arranged/organ.  Reason for selecting to the congressional participation.	e trip involves an event the cation:  the location of the event ant number of Hoover senior fe	nal participation.	ganized specifically w	vith regard to
participation or b) the congressional participation.  This trip is arranged/organ.  Reason for selecting:  In order to have a signification the adquarters on the Stan	e trip involves an event the cation:  the location of the event ant number of Hoover senior fe	nal participation.  or trip	ganized specifically w	vith regard to
participation or b) the congressional participation. This trip is arranged/organ.  Reason for selecting to have a signification of the standard selection selectio	e trip involves an event the cation:  the location of the event ant number of Hoover senior ferord University campus.	nal participation.  or trip  llows participate in the exactlity:	ganized specifically w	vith regard to
participation or b) the congressional participation. This trip is arranged/organ.  Reason for selecting to have a signification of the standard selection selectio	e trip involves an event the pation:  the location of the event ant number of Hoover senior fer ford University campus.  Thotel or other lodging factors	nal participation.  or trip  llows participate in the exactlity:	ganized specifically w	vith regard to
Participation or b) the congressional participation. This trip is arranged/organ.  Reason for selecting:  In order to have a signification of the endquarters on the Stan.  Name and location of Stanford Guest House, 25	e trip involves an event the pation:  the location of the event ant number of Hoover senior fer ford University campus.  Thotel or other lodging factors	nal participation.  or trip  clows participate in the exact collity:	ganized specifically w	vith regard to

<b>(:)</b>
(:)
(3)
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21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	All lodging, meals, and other expenses are within the official federal government travel per diem rate for Pal Alto, CA
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	Stanford University's Hoover Institution will provide coach-class, roundtrip airfare between D.C. and San Fransisco, and roundtrip
	ground transportation between Stanford University and SFO airport.
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
	None.
25.	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):  Signature of Travel Sponsor:
	Name and Title: Michael G. Franc, Director of Washington, D.C. Programs
	Name of Organization: Hoover Institution
	Address: 1399 New York Avenue, NW, Suite 500, Washington, D.C. 20005
	Telephone Number: 202-760-3189
	Fax Number: 202-760-3191
	E-mail Address: mfranc@stanford.edu

Last	First
Bunn	Daniel
Dudley	Lauren
Geho	Doug
Grice	Savannah
Kim	Sunmin
McGuire	Monica
McLeod	Josh
Merkel	Theo
Wrase	Jeff

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# EXAMINING AMERICA'S ECONOMIC PROSPERITY AUGUST 14-16, 2018 STANFORD UNIVERSITY'S HOOVER INSTITUTION

#### TUESDAY, AUGUST 14

All meetings will be held in Lou Henry Hoover Room 115, 580 Serra Mall, Stanford, CA 94305, unless otherwise noted.

8:05 AM	Depart DCA – United Airlines Flight 2042
11:00 AM	Arrive SFO – Shuttle to Lou Henry Hoover Building at Stanford University
12:00 PM	Tom Gilligan – Welcome & Lunch
1:00 – 2:10 PM	John Taylor – Principles for Restoring Prosperity
2:10 - 3:20 PM	David Henderson – A Need for Regulatory Reform
3:30 – 4:40 PM	Stephen Haber – Why 21st Century Growth Depends on Property Rights
5:00 - 5:45 PM	Condoleezza Rice – Trade and Domestic Economic Growth
6:30 - 8:00 PM	Informal Dinner – Thaiphoon Location: 543 Emerson St. Palo Alto, CA 94301

#### WEDNESDAY, AUGUST 15

9:00 - 10:15 AM

All meetings will be held in Lou Henry Hoover Room 115, 580 Serra Mall, Stanford, CA 94305, unless otherwise noted.

Eddie Lazear – Another Look at Tax Reform and Economic Growth

#### Continental Breakfast is provided at Stanford Guest House starting at 6am

10:30 – 11:45 AM	Henry Miller – Three Tales of Woe: How Federal Regulation Has Damaged Entire Sectors of Biotechnology
12:00 – 1:30 PM	John Cogan – Why America is Going Broke: Fixing the spending problem Lunch will be served during this session
1:45 – 2:45 PM	Robert Hall – The Bad News about Stagnant Wages, and How to Improve Wage Growth
3:00 – 4:30 PM	Jennifer Burns & Jean Cannon – A View from Hoover Archives: Milton Freidman on a Guaranteed Annual Income Location: Tower 110 Classroom, Hoover Tower



4:30 – 6:00 PM Tour of Hoover Tower, Herbert Hoover Memorial Exhibit Pavilion, or Stanford

University campus/Break

6:00 – 8:30 PM Dinner & Keynote Remarks by Caroline Hoxby – The Role of Education in

Promoting Economic Growth

Location: Fairweather Courtyard/Pavilion

#### THURSDAY, AUGUST 16

All meetings will be held in Lou Henry Hoover Room 115, 580 Serra Mall, Stanford, CA 94305, unless otherwise noted.

Continental Breakfast is provided at Stanford Guest House starting at 6am

8:00 AM Shuttle departs Stanford Guest House – bring luggage

8:30 – 9:45 AM Daniel Kessler – Health Care Reform

9:55 – 10:55 AM Josh Rauh – Pensions: How Unfunded Liabilities Can Hamper Economic

Prosperity

11:00 AM Pick up boxed lunch & shuttle departs campus for SFO

1:10 PM Depart SFO – United Airlines Flight 2046

9:26 PM Arrive DCA



All officially-connected programs highlight a specific policy area that is directly related to the work of the congressional staff in attendance. The goal of these fellowships is to provide expert insight into the many policy areas surrounding the important work congressional staff do by providing a wide array of experts to discuss a diverse range of policy issues. Staff have been individually evaluated and selected with a particular emphasis to those that have a portfolio that aligns with economic prosperity.



### STUART FAMILY CONGRESSIONAL FELLOWSHIP PROGRAM

AUGUST 14-16, 2018 STANFORD UNIVERSITY'S HOOVER INSTITUTION, PALO ALTO

Group Flight Information:

Outbound flight: Tuesday, August 14, 2018

Flight Number – UA 2042 Departure Airport - DCA Departure Time – 8:05amET

Arrival Airport – SFO

Arrival Time – 11:00amPT

Return Flight: Thursday August 16, 2018

Flight Number – UA 2046 Departure Airport – SFO Departure Time – 1:10pmPT Arrival Airport – DCA

Arrival Time – 9:26pmET

# Group Flight Itinerary



Travel Expenses (Form RE-1 and Form RE-2), along with a copy of the Private Sponsor Travel Certification Form, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) within 30 days of the conclusion of Privately-Sponsored Travel.

Finally, Senate Rule 34 requires a reporting individual,<sup>4</sup> on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Deborah Sue Mayer

Chief Counsel and Staff Director

Dobonah du Mayon

Enclosure: Travel Checklist

<sup>&</sup>lt;sup>4</sup> A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$126,148 for CY 2018) or is a political fund designee and is required to file Financial Disclosure Reports.